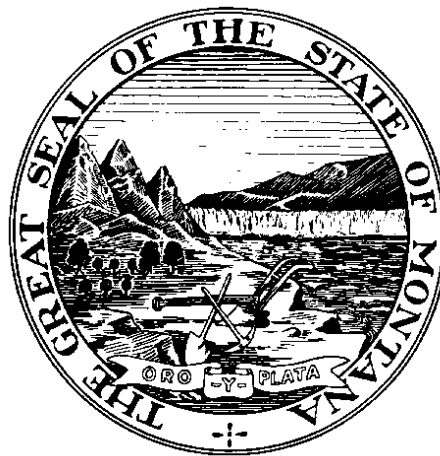


# **Supervisor's Guide to the State's Early Return-to-Work Program and Workers' Compensation**



**Human Resource Standards and Services Bureau  
State Personnel Division  
Department of Administration  
Revised September 2004**

## **Purpose**

The purpose of this guide is to introduce the state's transitional employment program and to familiarize supervisors with the ways the current workers' compensation system interfaces with the state's human resource system. Implementation of an early return-to-work program must be tailored to the needs of specific agencies. The guide provides information along with sample letters and forms to assist agencies in the process.

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**STATE OF MONTANA EARLY RETURN-TO-WORK (ERTW) PROGRAM**

The State of Montana believes state employees are the most important assets of state government. We are committed to assisting our employees eligible for or receiving worker's compensation to return to work as soon as medically appropriate and working with the medical community to help the injured employees regain their livelihood.

The focus of the State of Montana Early Return-to-Work Program is to temporarily modify the employee's existing position or work schedule, or create a position to accommodate the temporary physical restrictions identified by the treating physician or other medical provider. If the injury results in permanent restrictions, we will strive to accommodate in compliance with the Americans with Disabilities Act (ADA) and the Montana Human Rights Act.

**The program is based on the following principles:**

- **Return injured employees to work as soon as medically appropriate.**  
Return employees to work as soon as possible with responsibilities and duties tailored to their abilities in order to maximize recovery.
- **Establish a maximum time limit.**  
Provide specific assignments with a start and end date set at the time of return to work.
- **Do no harm.**  
Transitional employment ensures rapid return to work, but only when such work is appropriate medically.
- **Maintain medical confidentiality.**  
Any information regarding medical examinations or inquiries must be treated as confidential, not shared with co-workers and others not allowed access to confidential information. It must be collected and maintained on separate forms in separate locked files.
- **Provide meaningful work.**  
Provide assignments with flexible duties that may change daily or weekly depending on the employee's medical progress.
- **Involve both the employee and supervisor in decision-making.**  
Ensure work assignments are appropriate for the employee.
- **Document efforts.**  
Developed a transitional employment plan for each worker with clearly spelled out responsibilities and expectations.
- **Maintain continuity**  
Keep the employee working in his or her own department with fellow employees whenever possible.

## What is an Early Return-to-Work (ERTW) Program?

Early return-to-work programs provide short-term employment duties within a specified time frame for employees who have been injured and cannot return full-time to all their time-of-injury duties.

ERTW assumes that our employees are valuable assets. When an employee is injured, every attempt is made to bring the employee back to work quickly. In many cases, the employee's existing position or work schedule can be temporarily modified. When injuries prevent returning to the employee's own job, other duties may be temporarily assigned to accommodate the physical restrictions identified by the treating medical provider.

ERTW programs usually are referred to as **transitional employment**. Transitional employment includes only short-term duties:

- with limited physical ability requirements,
- that can be taught to the injured employee quickly,
- when a flexible work schedule would be permissible, and
- that would minimize exposure of the injured worker to further injury and would not slow down the recovery time.

**Light duty positions**, as they are used in this guide, are permanent reserved positions within an agency for employees who are temporarily or permanently unable to return to their positions due to a disabling condition. They **are not transitional employment**.

## Why have an ERTW program?

Studies show when individuals remain off work for six months only 50 percent return. Only 10 percent return when off work for more than a year. With an early return-to-work commitment, organizations can encourage an increased quality of life for injured employees. Employees report that often ERTW increases their morale and they feel valued by their employers.

Managers report a reduction in recovery time, open communications with the employee and referring medical provider, and the ability to "catch up" on some of the work piling up.

Workers' compensation payments can also be significantly reduced through an ERTW program. The wages paid an employee in transitional employment offset the payments made by the insurance company. Often the expenses for an industrial injury are less when the employee returns to work quickly.

**What are the benefits of a successful ERTW program?**

Returning your injured employee to work is a win-win proposition. The injured employee remains active and has a sense of value. The state retains a valuable and trained employee, helps speed the healing process, and works to minimize workers' compensation costs.

- **Your agency receives some level of production.** While your employee is at home, you are paying direct and indirect costs without receiving any productivity in return. An ERTW program gives you an opportunity to generate some productivity during the healing period.
- **Your agency can avoid replacement and training costs.** While the employee is recovering, the work still needs to be completed. Returning the employee to work can minimize the costs associated with training and replacing that employee.
- **Your agency may be able to identify workflow improvements and generate efficiencies while developing modified jobs.** As you examine the injured employee's position, you may find new and creative ways to bring the injured employee back to work. You may even discover efficiencies at the same time.
- **Your agency can significantly reduce compensation payments.** Compensation costs, one of the most expensive components of workers' compensation, are dramatically reduced.
- **Medical costs go down.** An injured employee in an ERTW program typically recovers more quickly and uses less medical care. This also can result in decreased premiums.
- **Increases loyalty of valuable employees.** Loyalty to your agency increases when you demonstrate a caring and concerned attitude.
- **Decreases a problem employee's opportunity to defraud the system.** With a mandatory ERTW program, you remove the incentive for filing fraudulent claims.
- **Your injured worker remains in the work force and maintains social contact with fellow employees.** This helps the healing process. Experience shows injured employees with ERTW options heal much quicker and return to full productive duty much earlier than those who do not have the same opportunity.

**What are the components of a successful ERTW program?**

These guidelines are designed to help managers develop an effective early return-to-work program. Because each agency is different, please modify the components to fit your own work environment.

As you develop your ERTW program, keep in mind the primary purpose is to transition the injured employee back to full, productive work.

- **Executive support.** You must have management support for the program to be successful. If the employee's position has been temporarily filled while the employee is unable to work, your managers need to determine where the FTE will come from to hire the employee for transitional duties. This can be determined ahead of time or on a case-by-case basis.
- **Formalize your agency's commitment.** ERTW options must be provided to all employees injured on the job, regardless of their productivity or performance. A formal statement outlining the agency's commitment to ERTW should be developed and provided to all employees. A sample statement can be found on page 17.
- **Assign responsibility for managing the program.** An individual or team should be assigned to coordinate and manage ERTW activities. A team could include a safety representative, a human resources expert knowledgeable in ADA and the Family Medical Leave Act (FMLA), a manager, and a union representative. This team should meet to develop and formalize the program, then meet weekly whenever a lost time claim occurs. The injured employee and direct supervisor should be invited to develop customized transitional employment. If the employee grants permission, it would also be appropriate to have staff members discuss ways to modify and assist the injured employee return to work.
- **Develop clear guidelines for reporting injuries.** Identify the person responsible for accepting notice of injuries and immediately notifying the workers' compensation insurance company. Train your employees on the reporting procedures.
- **Establish a target return-to-work date.** Send a return-to-work form and cover letter with the injured employee to give to the medical provider during the initial visit. Samples of the form and letter are included in the guide. Some agencies report a positive result when managers accompany the injured

employee to the first visit and obtain a return-to-work release in person. You will need a copy of the employee's job description, including the physical requirements and working conditions, for the medical provider's review. If a release does not occur on the first visit, maintain contact with your employee and the workers' compensation insurance company claim adjuster on a weekly basis to establish an anticipated return-to-work date. Obtain the limitations or injured employee's abilities, anticipated target return-to-work dates, proposed length of restricted duty and anticipated release to full duty.

- **If possible, modify your employee's existing job.** Based on limitations described by the medical provider, focus first on modifying the employee's existing job. This may include reducing the number of hours worked in a shift and allowing time to visit the health care provider. Find meaningful, productive work for the employee and, if necessary, create temporary employment to accommodate the employee's limitations. Use existing procedures to establish the position. A "transitional worker" classification title is available. A letter with a list of duties for a specific amount of pay, with a specific hire date and end date is sufficient documentation for classification purposes.
- **Determine an appropriate wage for the temporary work.** If wages are decreased, the workers' compensation insurance company will pay the employee the difference between pre-injury wage and temporary wage, not to exceed the temporary total disability rate.
- **Follow up with the injured employee.** After the employee returns to work, maintain frequent contact to determine potential problems and the necessity for additional modifications. If necessary, make adjustments to accommodate the employee's needs.
- **Maintain confidentiality.** Remember that the employee's medical information must be kept confidential, unless the employee specifically grants permission for the manager or supervisor to disclose information to co-workers or anyone else who does not have access to confidential medical information. All information collected regarding medical examinations or inquiries must be treated as confidential records, collected and maintained on separate forms in separate files as required by the state's employee record keeping policy. If your agency establishes a team, ask the employee to grant permission for the team members to have access to medical information and have a permission form signed before releasing any information to members of the team.
- **Remain flexible.** Remember, the goal is to return the injured employee to the

original position at the time of injury. Complications commonly arise during this transition period. Don't give up. If problems occur, continue to modify to reach the desired outcome.

### **Complications to the ERTW process**

Poor-performing employees, employees facing termination due to a reduction in force, short-term employees, substance-abusing employees, or employees nearing retirement age have the potential to complicate efforts to develop an effective ERTW program.

Employees may refuse to take a modified job or you may not have appropriate work available. Resolving problems requires effort and coordination. Remaining firm with your commitment to provide ERTW options is the most effective tool you have to combat complications.

### **Who are the players in ERTW?**

ERTW requires coordination between:

- Personnel managers
- Safety coordinators
- Workers' compensation insurance company adjusters
- Agency workers' compensation coordinator or team
- Union representatives
- Managed care organizations
- Referring physicians
- Vocational rehabilitation counselors
- Other medical providers

### **What are the steps in the ERTW program?**

1. When an employee is injured, the claim adjuster at the workers' compensation insurance company or managed care organization will contact the agency to discuss options regarding placement of the injured employee into transitional employment.
2. If an injured employee qualifies for ERTW, your agency must provide a job description that includes the physical requirements to the attending medical provider. This will allow an accurate decision regarding the type of duties the injured employee is able to perform while in the ERTW program. Employees must be evaluated on a case-by-case basis.



If possible, the agency should first modify the employee's current duties. This can be as simple as reducing the normal working hours until the employee can work full time. In some cases, a separate position may be temporarily created to allow the employee to perform meaningful work during the healing process. The medical provider can assess the temporary physical limitations of the employee and recommend the kinds of duties that may be performed safely. The agency has to determine what duties are available within the organization that would qualify for transitional duty. These duties may be identified and described on a periodic basis, or when the need arises to bring an employee back to work.

3. Once the description of duties is approved, your agency needs to make an offer of employment to the injured employee. Transitional employment is temporary and must have a designated start and end date set at the time of return to work. The end date may be extended for another specific time if the employee needs additional time to recover or the employee may be assigned to other transitional duties with a specific start and end date.
4. The employee must notify the insurance claim adjuster of the offer. At that time, the claim adjuster will adjust the compensation benefits based on the number of hours offered per week and the wage. These amounts will equal the usual wage of the injured employee. This adjustment occurs whether the employee accepts the offer of employment or not, unless the temporary position requires relocation.
5. The agency must notify the claim adjuster when an injured employee accepts or refuses the offer. The claims adjuster will adjust the benefits promptly. It is possible for an injured employee to lose benefits if the employee refuses an offer equal to normal wages and hours. If an employee accepts transitional duty, the insurance company will underwrite the workers compensation coverage until the injured employee can return to the time-of-injury job.

**What is Workers' Compensation?**

Workers' compensation is an insurance program designed to provide, without regard to fault, wage loss benefits and medical benefits to workers suffering from a work-related injury or occupational disease. It is required for most types of employment. The State of Montana is covered by the State Compensation Insurance Fund (State Fund).

**Why should managers and supervisors become familiar with the workers' compensation system?**

Managers and supervisors are key players in promoting safety at work, encouraging workers to return to their jobs, keeping costs associated with accidents and work-related illnesses low, and managing the work so productivity is not lost while an employee is temporarily disabled.

Agency premiums are based on payroll amounts multiplied by the job-specific rates for the types of workers employed, factoring in the cost of providing insurance benefits due to accidents in the agency. Managers and supervisors can help reduce those costs by working with State Fund to develop safety programs, reporting accidents early, managing absences so employees return to work as soon as they are able, and adopting an ERTW program.

**What are the reporting requirements for on-the-job illness or injury?**

All on-the-job injuries must be reported to the supervisor or State Fund as soon as possible and preferably within 24 hours. Even minor injuries should be reported to the supervisor, whether or not the employee receives medical treatment. After the manager or supervisor receives the report, notify State Fund immediately.

The employee must submit a written and signed claim for benefits within 12 months from the date of the accident. This form can be submitted to the supervisor, State Fund, or the Department of Labor and Industry.

State Fund's First Reporting Unit	1-800-243-9121
State Fund's Customer Service Unit	1-800-332-6102

By signing the claim for benefits, the employee validates that the information on the claim is true. It is a crime of theft to obtain benefits to which the employee is not entitled. Helping someone else to fraudulently obtain benefits is also a crime. *Anyone can report suspected fraud by calling the fraud hot-line at 1-800-922-2873.* You do not have to give your name.

**What types of benefits are provided?**

- **Medical Benefits** – These benefits cover medical expenses incurred because of the illness or injury. The injured employee is not responsible for payment of any reasonable medical treatment.
- **Wage Loss or Indemnity Benefits**
- **Temporary Partial Disability (TPD) Benefits** - Paid to workers temporarily unable to return to the position they held at the time of their injury, but able to work in a modified or alternative position paid at a lower wage.
- **Temporary Total Disability (TTD) Benefits** - Paid to workers who have a total loss of wages until they reach maximum medical improvement or return to the job they held at the time they were injured or to a job with similar physical requirements or to an alternate position.
- **Permanent Partial Disability (PPD) Benefits** - Paid to workers who are permanently impaired due to their injury but are able to return to the workforce in some capacity.
- **Permanent Total Disability (PTD) Benefits** - Paid to workers unable to return to the workforce due to their injuries. Permanently partially disabled workers are also eligible for an impairment award.
- **Rehabilitation Benefits** - Paid to workers who meet specific eligibility requirements. These payments may include training costs and purchase of equipment.

**Does State Fund allow freedom of choice of medical providers?**

The employee has freedom to choose a medical provider. However, under certain circumstances, State Fund may direct the employee to a managed care organization. In case of an emergency, medical care can be provided by the employee's regular physician or the nearest appropriate emergency care providers.

Once State Fund accepts the injury or occupational disease claim, employees are entitled to reasonable doctor, hospital, prescription and other medical care costs. Allowable charges are paid according to a medical fee schedule. The employee is not required to pay for any reasonable and related medical treatment.

**If an employee is injured or becomes ill at work, is there job protection until a doctor determines the employee is fit to return to work?**

Montana's workers' compensation laws do not provide job protection for an employee. They do provide preference over other applicants to the agency within 2 years from the date of injury for a comparable position consistent with the condition and abilities of the employee. The employee must have a medical release for return to work.

State employees must request leave due to disability resulting from an industrial accident. The state's "Disability and Maternity Leave" policy, MOM #3-0315, does not guarantee the approval or granting of leave requested. Agencies must approve or disapprove requests for leaves of absence due to disability consistent with the policy and other rules established for requesting leaves of absence.

The employee may have some additional protections under collective bargaining agreements, the Family and Medical Leave Act, the Americans with Disabilities Act and the Montana Human Rights Act. For example, a qualified individual with a disability may request an accommodation to perform the essential functions of the job. The agency must provide a reasonable accommodation unless to do so would impose an undue hardship. State Personnel Division has issued a "Reasonable Accommodation Guide" to assist agencies in this situation.

**Is an injured employee eligible for Family and Medical Leave Act (FMLA) benefits?**

If the employee has worked for the state for at least one year and has worked at least 1,040 hours during the previous 12 months, has a serious medical condition, especially if time lost from work is required, the employee is entitled to the rights guaranteed under FMLA. The employee should receive notice of the rights and benefits available under the law, including up to 12 weeks of job protected leave and payment of up to 12 weeks of the state share for health insurance benefits, within 1-2 days after the supervisor or manager is informed of the accident or illness.

**Are all injured workers covered by the Americans with Disabilities Act (ADA) and the Montana Human Rights Act?**

Disability is defined differently under workers' compensation law than under these laws. ADA and the Montana Human Rights Act may not apply to workers who have temporary disabilities. However, individuals perceived to be disabled by an employer are covered under these Acts.

Many employees filing discrimination complaints with the Equal Employment Opportunity Commission (EEOC) since 1993 claimed they were discharged for being disabled. Employees with industrial accidents are often these charging parties. Consult with your personnel officer and your agency ADA coordinator to determine whether your employee has protections under these laws.

**If an agency reserves some permanent light duty positions for employees with on-the-job injuries, does the ADA require the agency to consider reassigning an employee with a disability who is not injured at work to those positions as a reasonable accommodation?**

If an employee with a disability (who was not injured on the job) becomes unable to perform the essential functions of the job, and there is no other effective accommodation available, the employer must reassign the employee to a vacant permanent reserved light duty position as a reasonable accommodation if (1) the employee can perform the essential functions, with or without a reasonable accommodation; and (2) the reassignment would not impose an undue hardship. This is because reassignment to a vacant position and appropriate modification of an employer's policy are forms of reasonable accommodation required by the ADA, absent undue hardship. An employer cannot establish that the reassignment to a vacant reserved light duty position imposes an undue hardship simply by showing that it would have no other vacant light duty positions available if an employee became injured on the job and needed light duty.

If the agency provides transitional employment for workers injured on-the-job only on a temporary basis, and does not have reserved permanent light duty positions, it need only provide work for an employee with a disability-related on-the-job injury.

**What happens if an employee is involved in a disciplinary process when injured and is unable to work?**

Each situation must be evaluated to determine the best course of action. The disciplinary process may be suspended until the employee returns to work. If an employee has committed a serious offense, management may decide to complete the disciplinary process up to and including discharge.

**What kinds of leave are available to an employee during the 5-day qualifying period for wage loss benefits?**

Some agencies have policies requiring the use of paid leave before leave without pay will be approved. State law allows injured employees to use sick leave, annual leave, or leave without pay during the 5-day qualifying period. Holiday pay and compensatory time may not be used.

**Can the employee receive any form of paid leave from the state while receiving wage loss benefits?**

Injured employees may use annual vacation leave, with agency approval, without affecting their eligibility for wage loss benefits. Sick leave use is allowed only if a collective bargaining agreement is in place which allows the employee to augment the workers' compensation benefit with sick leave. Holiday pay and compensatory time use is not allowed – except that holiday pay and compensatory time may be paid at the same time as permanent partial disability benefits.

**Is an employee covered by workers' compensation if injured while working at home?**

Employees working at home are covered by workers' compensation if the employee is injured while performing job duties.

**Is an employee covered by workers' compensation if injured while participating in an employer-sponsored event, such as a holiday party or staff picnic?**

Normally, employer-related recreational events are not covered. The primary determining factors will be if the event is in the course and scope of employment. The types of information that will determine whether the activity is covered are:

- whether the activity was undertaken at the employer's request;
- whether the employer, directly or indirectly, compelled the employee's attendance at the activity;
- whether the employer controlled or participated in the activity, such as paying for a portion of the costs related to the activity;
- whether both employer and employee mutually benefited from the activity.

**Is the employee still eligible for wage loss benefits while participating in the state's early return-to-work program?**

Possibly. The employee may be eligible for temporary partial disability benefits before reaching maximum medical improvement, if the employee:

- is temporarily unable to return to the position held at the time of injury because of a medically determined physical restriction, and
- returns to work in a modified or alternative position, and
- suffers a partial wage loss.

The employee may re-qualify for temporary total disability benefits if a modified or alternative position is no longer available and the disability continues. The benefit is

limited to 26 weeks with an extension available.

**What if the employee can no longer work because of the injury?**

If, after the physician or other medical provider determines the employee has reached maximum medical improvement and is not able to return to any regular employment, the employee may be eligible for permanent total disability benefits. Regular employment means recurring work performed for pay in a trade, business, profession or other occupation in the state. The employee also may be eligible for disability retirement through the state's retirement systems.

**Death Benefits**

If an on-the-job injury or an occupational disease is the cause of death, the employee's spouse and unmarried children receive weekly compensation benefits at the temporary total disability rate. The spouse receives benefits for 500 weeks from the date of death or until remarried. Unmarried children receive benefits until age 18, or age 22 if attending an accredited school or apprenticeship program. If the employee has no spouse or unmarried children, dependent parents, brothers or sisters may be eligible for weekly benefits. Burial expenses, not to exceed \$1,400, also are payable by the insurance company.

**Rehabilitation Benefits**

A disabled worker is eligible for rehabilitation benefits if the worker has a permanent partial impairment attributed to the on-the-job injury, the employee cannot return to employment at the same wage, or has an impairment rating of greater than 15%, and an insurer-designated rehabilitation provider certifies the worker will have a reasonable reduction in the actual wage loss with rehabilitation.

**Questions?**

If you have any general questions about workers' compensation, please call the Employment Relations Division, Department of Labor and Industry, at (406) 444-7751 or 444-3089. If you have questions for State Fund, call the customer service unit at 1-800-332-6102. If you have questions about personnel policies, contact your personnel officer. If you have questions about the state's early-return-to work program, contact the Risk Management & Tort Defense Division, Department of Administration, at 444-3600.

**Sample Early Return-to-Work Policy Statement**

(Department Name) believes employees are the most important asset of the agency.

We are committed to assisting our employees eligible for or receiving worker's compensation to return to work as soon as medically appropriate, and to working with the medical community to help the injured employees regain their livelihood and self-respect.

**Employees must report all injuries and work-related illnesses** (to the supervisor or workers' compensation coordinator) **the same day of the incident.** Employees should also advise their treating physician or other medical provider of the early return-to-work program.

There are many ways to implement an early return-to-work program that meet both the needs of the agency and the injured worker. Our focus will be to first temporarily modify the employees' existing position or work schedule, then to temporarily create a position to accommodate the temporary physical restrictions identified by the treating medical provider. If the injury or illness results in permanent restrictions we will strive to accommodate these restrictions so the employee can return to the time-of-injury position.

Thanks. And please remember--most injuries can be prevented.

Sincerely,

Director  
State Department

I have read and understand the above:

Employee Signature:\_\_\_\_\_ Date:



## Sample Letter for Physicians

Date  
Name  
Address  
City, State, Zip

Dear Dr. Smith:

Ms. Jones has been an employee of the Department of \_\_\_\_\_ since January 1, 1989. She has worked as a warehouse worker. She slipped and fell on her right buttock on January 2, 2002. (NOTE: Do not diagnose, i.e., hurt her back, just state the mechanics of the injury.)

Our employees are important to us, and we are interested in safeguarding their jobs. If they are unable to return to their full duties immediately, we will try to modify those duties. We are willing to schedule their work around diagnostic or treatment appointments, if necessary. Please assist us by providing restrictions or functional capacities following every appointment.

The position of warehouse worker requires frequent lifting of 25 pounds maximum. (NOTE: Briefly describe the physical demands keying in on functions compromised by the injury.) If necessary, we will provide work that can be performed while sitting, standing or walking; and requires no lifting, bending or stooping. The employee can work at her own speed, and modify her approach to the job at will. If you need to discuss the specific work available further, please call Joe Johnson at 999-1111.

When Ms. Jones returns to work, we will attempt to modify her job or provide her with temporary duties which will not impede her medical progress.

Enclosed are Return-to-Work Recommendation forms. Please complete one for each appointment. We are looking forward to working with you to ensure a safe and permanent return-to-work for our employee.

Sincerely,

(Name)  
(TITLE)

Enclosures

**Sample Return-to-Work Recommendations**

Dear Dr.:

Our employees are important to us. We want them to return to work within their functional capacities as soon as they can. Please help us by providing the following information at each appointment. If you need additional information about the job duties, please call \_\_\_\_\_ at \_\_\_\_\_.

Upon completion of this form, please provide the employee with a copy to return it to our office and also forward a copy to Montana State Fund, PO Box 4759, Helena, MT 59604-4759. Please feel free to make copies of this form for future visits.

**To be completed by physician or other medical provider:**

Patient:

(1) Patient may resume full duties with no restrictions on \_\_\_\_\_.

(2) Patient may resume modified duties on \_\_\_\_\_ with the following restrictions:

Patient is able to:

Sit	_____ frequently	_____ occasionally	_____ not at all
Stand	_____ frequently	_____ occasionally	_____ not at all
Walk	_____ frequently	_____ occasionally	_____ not at all
Bend	_____ frequently	_____ occasionally	_____ not at all
Twist	_____ frequently	_____ occasionally	_____ not at all
Stoop	_____ frequently	_____ occasionally	_____ not at all

Other restrictions (repetitive movements, lifting, use of extremities, etc.):

(3) Any treatment and/or medication that might affect patient when returning to work:

\_\_\_\_\_ Yes      \_\_\_\_\_ No

(4) Duration of limitations indicated above:

(5) Next appointment:

(6) Signature: \_\_\_\_\_ Date:

Phone number:

cc: Montana State Compensation Fund

**Sample Job Analysis**

Date \_\_\_\_\_

Job Title \_\_\_\_\_ Contact Person \_\_\_\_\_

Work Hours \_\_\_\_ am/pm to \_\_\_\_ am/pm Days per Week \_\_\_\_\_

Breaks \_\_\_\_\_ Overtime \_\_\_\_\_

Video of Job Activities Enclosed: \_\_\_\_\_ Yes \_\_\_\_\_ No

General Description of the Job: \_\_\_\_\_

Essential Functions of the Job: \_\_\_\_\_

Types of Machines, Tools, Special Equipment: \_\_\_\_\_

Vehicles or Moving Equipment Operated: \_\_\_\_\_

Percent of Time Spent:

Sitting: \_\_\_\_\_ %

Standing: \_\_\_\_\_ %

Walking: \_\_\_\_\_ %

Inside: \_\_\_\_\_ %

Outside: \_\_\_\_\_ %

Comments: \_\_\_\_\_

While working, the employee must:

		Yes	No	Frequency	Comments
A.	Twist	<input type="checkbox"/>	<input type="checkbox"/>		
B.	Stoop/Bend	<input type="checkbox"/>	<input type="checkbox"/>		
C.	Squat	<input type="checkbox"/>	<input type="checkbox"/>		
D.	Kneel	<input type="checkbox"/>	<input type="checkbox"/>		
E.	Crawl	<input type="checkbox"/>	<input type="checkbox"/>		
F.	Climb	<input type="checkbox"/>	<input type="checkbox"/>		
G.	Walk on uneven ground	<input type="checkbox"/>	<input type="checkbox"/>		
H.	Foot movements (foot pedals, controls, etc.)	<input type="checkbox"/>	<input type="checkbox"/>		
I.	Finger and Hand Dexterity	<input type="checkbox"/>	<input type="checkbox"/>		
J.	Push up to 10 lb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Push 11-24 lb	<input type="checkbox"/>	<input type="checkbox"/>		
	Push 25-50 lb	<input type="checkbox"/>	<input type="checkbox"/>		
K.	Pull up to 10 lb	<input type="checkbox"/>	<input type="checkbox"/>		

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	Pull 11-24 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Pull 25-50 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Pull 25-50 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Pull over 50 lb	<input type="checkbox"/>	<input type="checkbox"/>
L.	Lift up to 10 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Lift 11-24 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Lift 25-50 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Lift over 50 lb	<input type="checkbox"/>	<input type="checkbox"/>
M.	Carry up to 10 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Carry 11-24 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Carry 25-50 lb	<input type="checkbox"/>	<input type="checkbox"/>
	Carry over 50 lb	<input type="checkbox"/>	<input type="checkbox"/>
N.	Reach over shoulder height	<input type="checkbox"/>	<input type="checkbox"/>
	Reach at shoulder height	<input type="checkbox"/>	<input type="checkbox"/>
	Reach below shoulder height	<input type="checkbox"/>	<input type="checkbox"/>

Working Environment:

		<b>Yes</b>	<b>No</b>
This job may be modified:	Temporarily:	<input type="checkbox"/>	<input type="checkbox"/>
	Permanently:	<input type="checkbox"/>	<input type="checkbox"/>

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**FOR MEDICAL PROVIDER'S USE ONLY**

\_\_\_\_\_ The injured employee can perform the physical activity described in the job duties analysis and can return to work on \_\_\_\_\_.

Estimated return to regular work \_\_\_\_\_.

\_\_\_\_\_ The injured employee can perform the physical duties described in the job analysis on a part-time basis for \_\_\_\_ hours per day.

**STATE OF MONTANA  
MEDICAL INFORMATION RELEASE**

**TO: PHYSICIANS, HOSPITALS, CLINICS, DISPENSARIES, PHARMACISTS,  
OTHER HEALTH CARE PROVIDERS, EMPLOYMENT RELATED SERVICES,  
AND STATE COMPENSATION INSURANCE FUND**

You are hereby authorized and requested to furnish my Supervisor and the Workers' Compensation Coordinator any and all health care information related to my job-related injuries or disease for which I have consulted you or for which I have received your services, including the nature of the physical impairment, history, contributing factors, complications, prescriptions, x-rays, copies of hospital or other records, estimates of the period and amount of disability, subjective symptoms, objective symptoms, diagnosis, prognosis and any future information which may be available to you.

You are authorized to speak in person or by telephone to my Supervisor and Workers' Compensation Coordinator concerning all health care information related to my job-related injury or disease.

**PRINT NAME OF PATIENT (EMPLOYEE)**

A photocopy of this authorization shall be considered as effective and valid as the original. This release is effective for thirty (30) months from the date of signature.

\_\_\_\_\_  
EMPLOYEE'S SIGNATURE

DATE

\_\_\_\_\_  
WITNESS SIGNATURE

DATE